

A person wearing a light-colored hat and a white sweater is walking away from the camera on a suspension bridge. The bridge has wooden planks and metal cables. The background is a dense forest with tall trees and green foliage. The entire image has a blue tint.

MARKET INSIGHTS PROGRAMME

MARKET PERCEPTIONS: THE COROMANDEL

YEAR ENDING JUNE 2022

BACKGROUND & RESEARCH APPROACH

Background

Angus & Associates is an independent marketing, research and strategic planning consultancy specialising in tourism and leisure. The Market Perceptions programme, a component of our Visitor Insights Programme (VIP), is designed to monitor perceptions of regional travel destinations within New Zealand to meet the needs of organisations across the industry, including Regional Tourism Organisations/Economic Development Agencies. The Market Perceptions programme offers subscribers a cost effective approach to profiling current and potential visitors to their region and to monitoring and benchmarking brand perceptions, through a syndicated survey of the domestic and Australian travel markets.

Research Approach

The Market Perceptions programme is conducted online, including on mobile devices. A total sample of at least n=7,200 New Zealand and Australian travellers are included in the programme each year (a monthly sample of n=300 New Zealanders and n=300 Australians), recruited via Dynata's consumer panel. Respondents must be aged 18+ years and must have travelled overnight within the past 12 months to participate in the research. Quotas based on New Zealand and Australian census data (region of residence, gender and age) have been set to ensure a representative and consistent sample to accurately monitor changes over time. This report is based on data collected between July 2021-June 2022.

The 'regional benchmark' referenced in this report is the average across 13 destinations – Auckland, Waikato, Bay of Plenty, The Coromandel, Tairāwhiti, Rotorua, Taupō, Hawke's Bay, Ruapehu, Waitaki, Central Otago, Queenstown and Dunedin.

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A woman wearing a light-colored, wide-brimmed hat and a light-colored, textured sweater is seen from behind, walking across a suspension bridge. The bridge has wooden planks and metal cables. The background is a dense forest of tall, thin trees. The entire image is overlaid with a semi-transparent blue filter. On the left side, there is a large white circle containing the word "SNAPSHOT" in a bold, sans-serif font.

SNAPSHOT

SNAPSHOT (YE JUNE 2022)

NEW ZEALAND TRAVELLERS

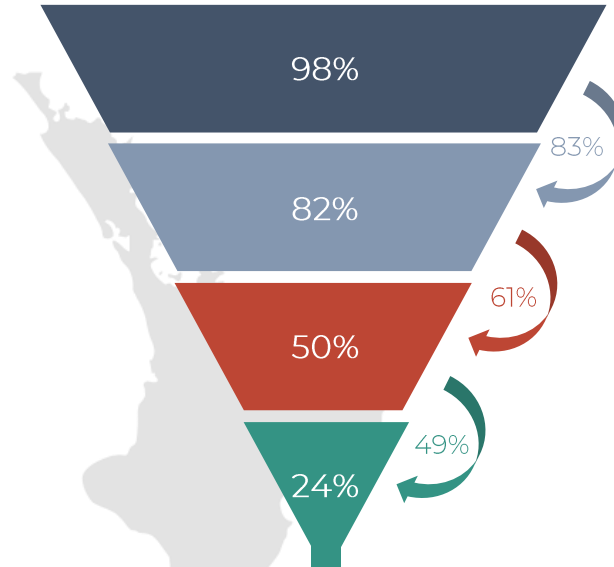
3 out of 4 New Zealanders travelled domestically within the past 12 months



13% of New Zealanders (excluding Coromandel residents) who travelled domestically in the past 12 months visited The Coromandel

New Zealand travellers associate The Coromandel with...

-  57% Walking & Hiking
-  50% Water Based Activities
-  43% Nature, Wildlife & Eco-Tourism
-  39% Family Activities
-  35% Scenic Sightseeing

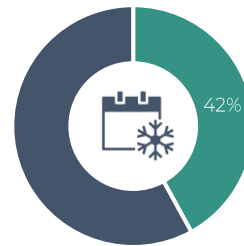


AWARENESS
Heard of the Coromandel

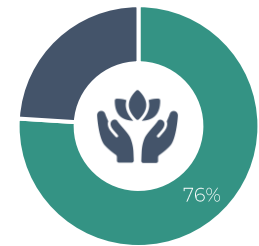
KNOWLEDGE
Visited the Coromandel or have some ideas about what to do there

APPEAL
Consider the Coromandel to be 'highly appealing'

PROPENSITY TO VISIT
Will probably/ definitely visit the Coromandel in next 12 months



42% of New Zealand travellers agree The Coromandel is a great place for a Winter holiday



76% of New Zealand travellers agree as a destination, The Coromandel is 'good for your soul'

SNAPSHOT (YE JUNE 2022)

AUSTRALIAN TRAVELLERS



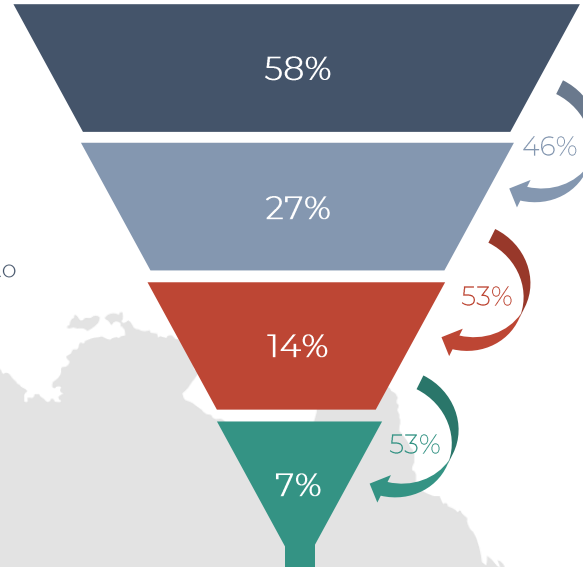
3% of Australians surveyed travelled to New Zealand in the past 12 months



11% of Australians who travelled to New Zealand in the past 12 months visited The Coromandel

Australian travellers associate The Coromandel with...

-  33% Nature, Wildlife & Eco-Tourism
-  32% Walking & Hiking
-  25% Scenic Sightseeing
-  24% Gardens, Parks & Reserves
-  24% History & Heritage

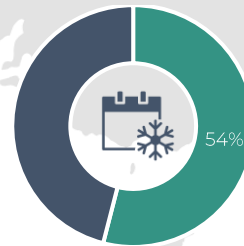


AWARENESS
Heard of the Coromandel

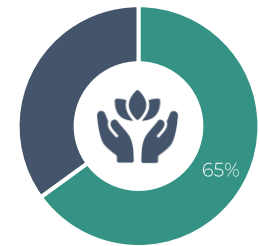
KNOWLEDGE
Visited the Coromandel or have some ideas about what to do there

APPEAL
Consider the Coromandel to be 'highly appealing'

PROPENSITY TO VISIT
Will probably/ definitely visit the Coromandel in next 12 months



54% of Australian travellers agree The Coromandel is a great place for a Winter holiday



65% of Australian travellers agree as a destination, The Coromandel is 'good for your soul'

A woman wearing a light-colored hat and a white top is seen from behind, standing on a wooden suspension bridge. The background is a dense forest of tall, thin trees. The entire image is overlaid with a semi-transparent dark blue filter. A large white circle is positioned on the left side of the image, containing the text.

**NEW ZEALAND
TRAVELLERS**

THE COROMANDEL UPDATE: YEAR ENDING JUNE 2022

While the proportion of New Zealanders travelling domestically remains stable, the past 12 months have been influenced by increased domestic competition and destination marketing by other regions.

The proportion of New Zealand travellers that find the Coromandel highly appealing is significantly higher than the regional benchmark (56% compared with 36%).

“Beaches”, “hot water beach”, “Cathedral Cove”, and “scenery” are the among the most common top-of-mind associations when New Zealand travellers think of the Coromandel. 42% of this group agree that the Coromandel is a great place for a winter holiday while a much higher proportion (76%) agree that the Coromandel is ‘good for your soul’.

The top four activities/experiences that New Zealand travellers associate with the Coromandel are walking/hiking, water-based activities, nature/wildlife/eco-tourism and family activities.

Net Promoter Score (NPS) is used to measure previous visitors’ propensity to recommend the Coromandel as a travel destination. For the period April - June 2022 the NPS for the Coromandel is +20. This is considerably higher than the regional benchmark of -10. More positively, NPS is higher still among recent visitors to the Coromandel, at +41.

The most common barriers to visiting the Coromandel for domestic travellers are there being no specific reason to visit (46%), and not having any connections there (31%).



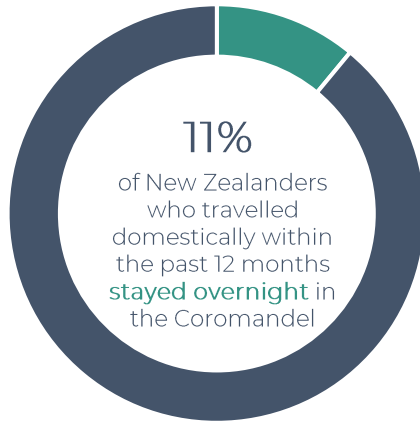
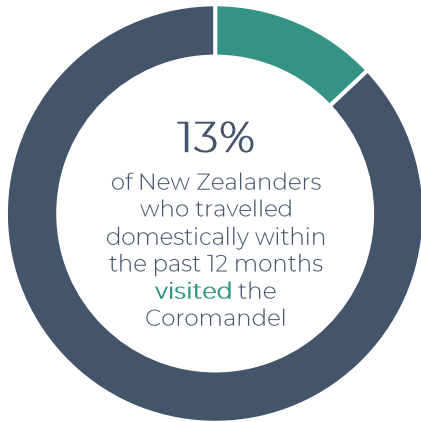
MARKET PENETRATION, FAMILIARITY & DESTINATION APPEAL



In the past 12 months, where (if anywhere) have you travelled? How familiar are you with the Coromandel as a destination to visit for a short break or holiday? How appealing is the Coromandel to you as a destination for a short break or holiday?

75%

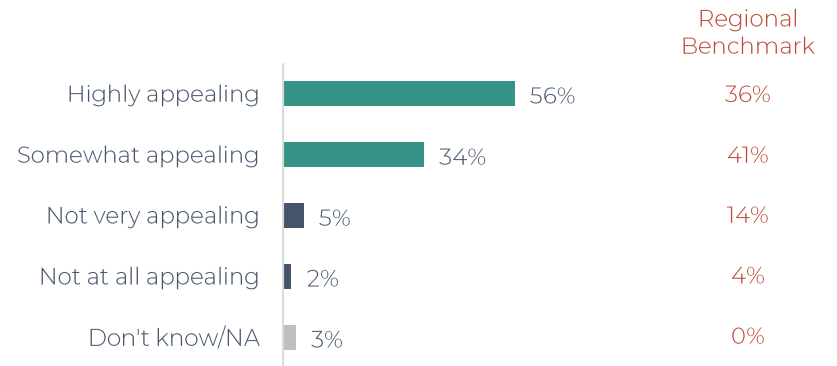
of New Zealanders travelled domestically around New Zealand in the past 12 months



Base: Travelled around NZ P12M, excluding residents (n=3,683)

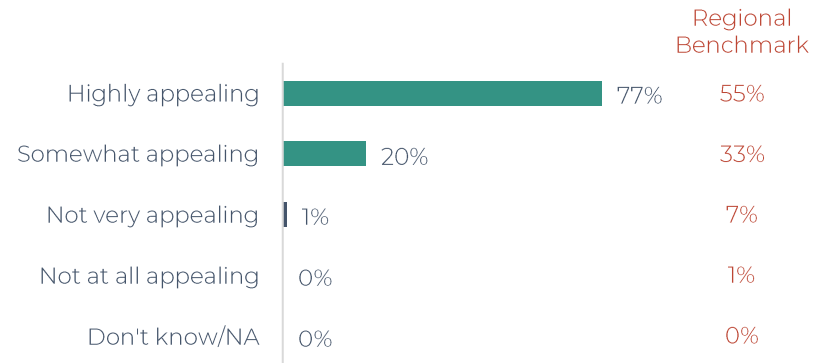
Familiarity		Regional Benchmark
I have visited the Coromandel	67%	67%
I have never visited, but do have some ideas about what you can do there	15%	13%
I have never visited, and don't know much about what you can do there	16%	18%
I have never heard of the Coromandel	2%	2%
Base: Total sample, excluding residents		n=3,744

DESTINATION APPEAL (TOTAL SAMPLE)



Base: Heard of the Coromandel, excluding residents (n=3,669)

DESTINATION APPEAL (RECENT VISITORS)



Base: Visited the Coromandel P12M (n=488)

VISITOR PROFILE



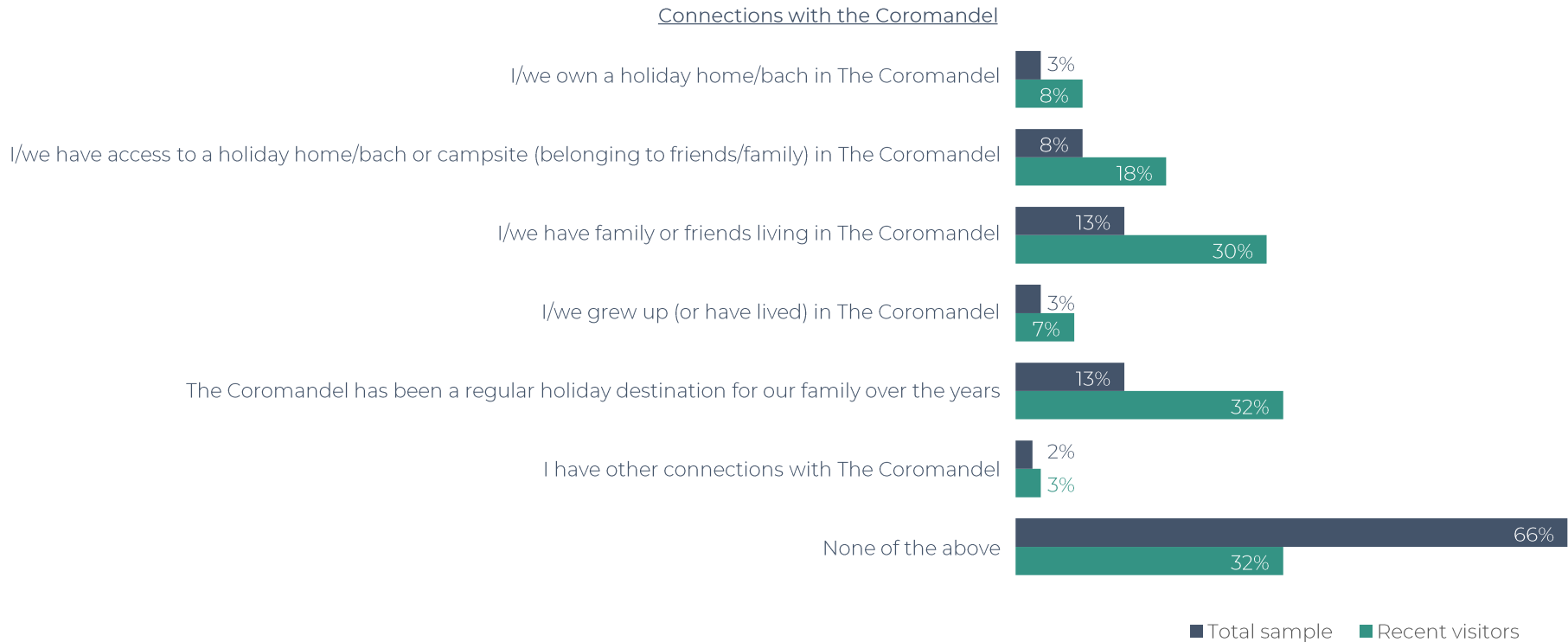
Region of Residence	Total Sample (excl. residents)	Visited the Coromandel (past 12 months)
Northland	4%	3%
Auckland	33%	47% ▲
Waikato	9%	19% ▲
Bay of Plenty	7%	13% ▲
Tairāwhiti / Gisborne	1%	1%
Hawke's Bay	4%	2% ▼
Taranaki	3%	2%
Manawatū-Whanganui	5%	2% ▼
Wellington (& Wairarapa)	11%	4% ▼
Tasman	1%	0% ▼
Nelson	2%	0% ▼
Marlborough	1%	0% ▼
West Coast	1%	0% ▼
Canterbury	13%	3% ▼
Otago	5%	1% ▼
Southland	2%	1% ▼
Base:	n=3,744	n=488

Age	Total Sample (excl. residents)	Visited the Coromandel (past 12 months)
18-19 years	3%	4%
20-29 years	18%	23% ▲
30-39 years	17%	17%
40-49 years	16%	18%
50-59 years	17%	10% ▼
60-69 years	14%	14%
70+ years	15%	14%
Household Composition		
My husband, wife or partner	63%	62%
My mother and/or father	8%	8%
My children aged under 5	11%	13%
My children aged 5 to 14	17%	18%
My children aged 15 or older	13%	11%
Other family/relatives	8%	8%
Other person(s)	8%	10%
None of the above – I live alone	12%	13%
Base:	n=3,744	n=488

THE COROMANDEL VISITOR PROFILE



Thinking now about any connections you may have to The Coromandel. Which, if any, of the following apply to you...?



Base: Total sample, excluding residents (n=3,744); Visited the Coromandel P12M (n=488)

ACTIVITIES / EXPERIENCES ASSOCIATED WITH THE COROMANDEL



Which, if any, of the following activities or experiences do you associate with the Coromandel?

Activities / Experiences	Module Sample	Recent Visitors
Walking & Hiking	57%	72%
Water-based Activities	50%	65%
Nature, Wildlife & Eco-tourism	43%	53%
Family Activities	39%	55%
Scenic Sight-Seeing	35%	39%
Golf, Fishing & Hunting	31%	51%
Restaurants, Cafés & Bars	30%	41%
Cycling/Mountain Biking	22%	28%
History & Heritage	21%	28%
Gardens, Parks & Reserves	20%	24%
Spa & Wellness	14%	21%
Events, Concerts & Festivals	11%	17%
Arts & Culture	9%	11%
Shopping	9%	13%
Māori/Pacific Culture	8%	11%
Wineries	7%	7%
Adrenaline Activities	6%	6%
Volcanic & Geothermal	5%	7%
Casinos/Gambling	2%	1%
Skiing/Snowboarding	2%	4%
Don't know/None of the above	9%	2%
Base:	Heard of the Coromandel n=1,402	Visited the Coromandel P12M n=179

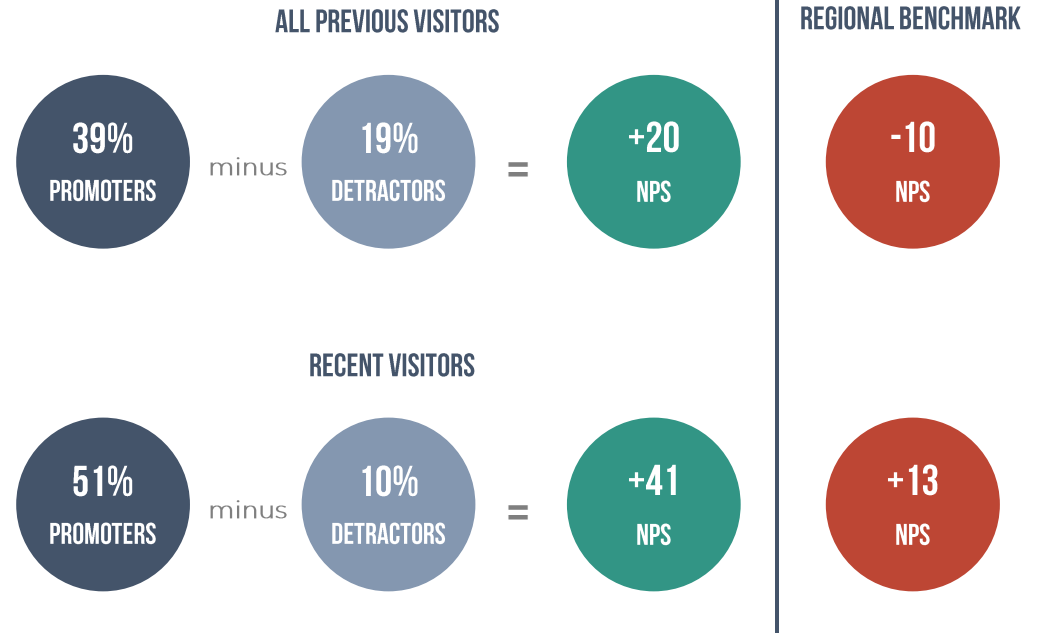
NET PROMOTER SCORE (NPS)



On a scale of 0 (not at all likely) to 10 (extremely likely), how likely are you to recommend the Coromandel as a travel destination to a friend, family member, or colleague?

The Net Promoter Score (NPS) is an indicator used globally to measure customer engagement and advocacy, based on the likelihood of a customer to recommend your product or service. Any positive score means that you have more loyal advocates willing to recommend your product or service (promoters) than unhappy critics (detractors). A passive customer is satisfied, but unenthusiastic. A high score of +100 means that every customer is a promoter, while a low score of -100 means that every customer is a detractor.

		Visited the Coromandel previously	Visited the Coromandel recently (P12M)
Promoters	10 (Extremely likely)	22%	29%
	9	17%	22%
	8	25%	25%
Passive	7	17%	13%
	6	6%	5%
Detractors	5	7%	3%
	4	1%	1%
	3	2%	1%
	2	1%	0%
	1	0%	0%
	0 (Not at all likely)	2%	0%
Base*:		n=602	n=116



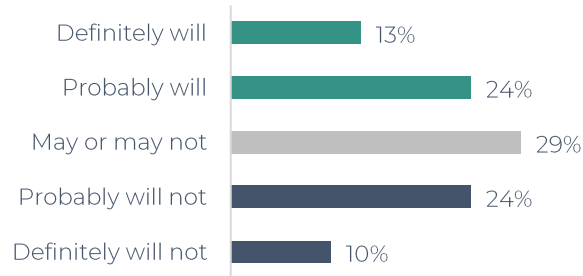
PROPENSITY TO VISIT THE COROMANDEL



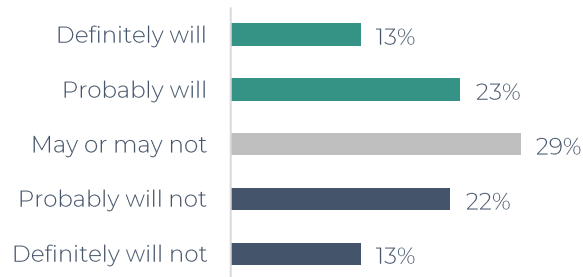
How likely are you to visit the Coromandel within the next 12 months? (for any reason / for leisure purposes)

84% of NZ travellers intend to travel domestically in the next 12 months (i.e. definitely / probably will travel around NZ)

PROPENSITY TO VISIT THE COROMANDEL IN NEXT 12 MONTHS (ANY REASON)



PROPENSITY TO VISIT THE COROMANDEL IN NEXT 12 MONTHS (LEISURE)



Base: Intend to travel domestically N12M, excl. residents, heard of the Coromandel (n=3,127)

FUTURE VISITOR PROFILE



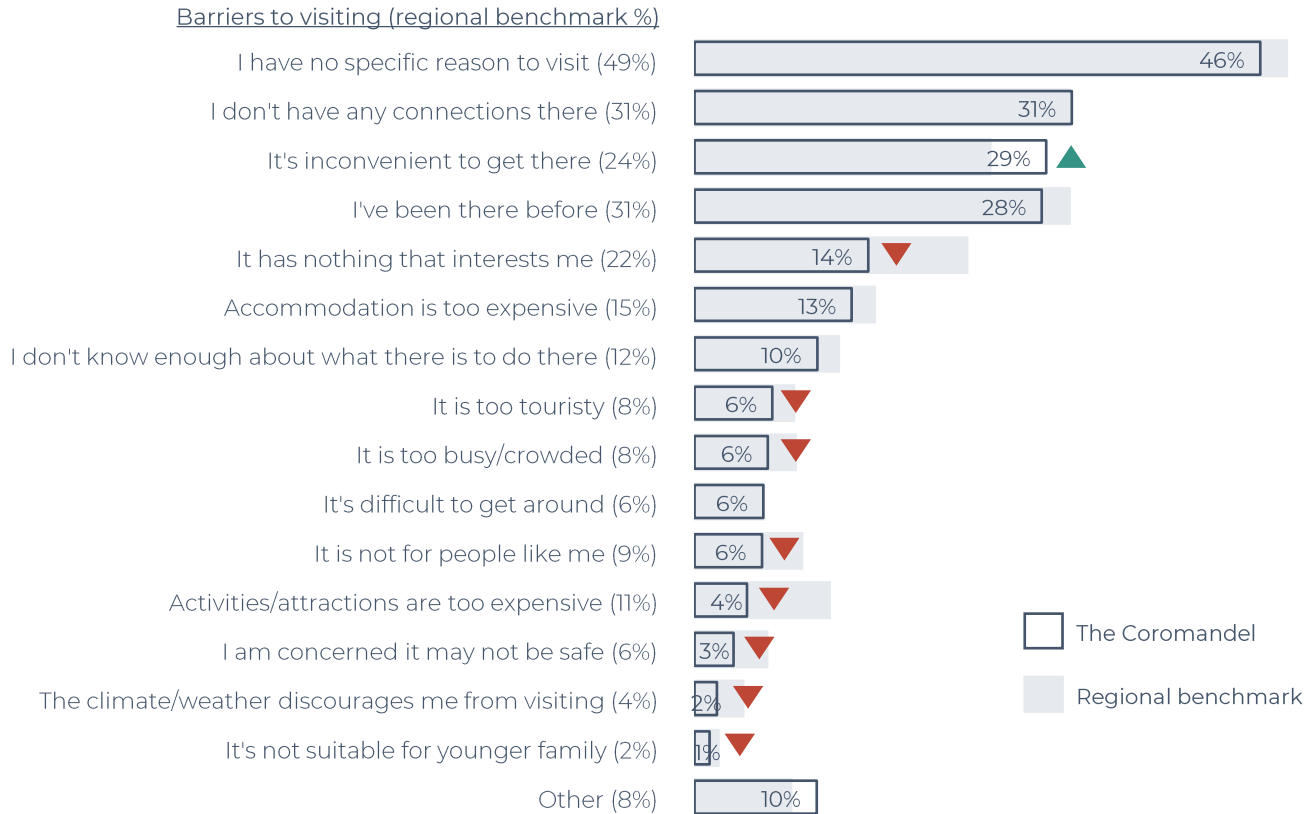
Region of Residence	Total Sample (excl. residents)	'Definitely' will visit the Coromandel (next 12 months)
Northland	4%	1% ▼
Auckland	33%	48% ▲
Waikato	9%	18% ▲
Bay of Plenty	7%	12% ▲
Tairāwhiti / Gisborne	1%	0%
Hawke's Bay	4%	2% ▼
Taranaki	3%	1% ▼
Manawatū-Whanganui	5%	2% ▼
Wellington (& Wairarapa)	11%	7% ▼
Tasman	1%	1%
Nelson	2%	0% ▼
Marlborough	1%	1%
West Coast	1%	0% ▼
Canterbury	13%	5% ▼
Otago	5%	1% ▼
Southland	2%	2%
Base:	n=3,744	n=400

Age	Total Sample (excl. residents)	'Definitely' will visit the Coromandel (next 12 months)
18-19 years	3%	3%
20-29 years	18%	20%
30-39 years	17%	21%
40-49 years	16%	22% ▲
50-59 years	17%	10% ▼
60-69 years	14%	12%
70+ years	15%	13%
Household Composition		
My husband, wife or partner	63%	64%
My mother and/or father	8%	6%
My children aged under 5	11%	15% ▲
My children aged 5 to 14	17%	24% ▲
My children aged 15 or older	13%	12%
Other family/relatives	8%	6%
Other person(s)	8%	9%
None of the above – I live alone	12%	12%
Base:	n=3,744	n=400

BARRIERS TO VISITING THE COROMANDEL



You mentioned that you are unlikely to visit the Coromandel within the next 12 months. Why is that?



▲ / ▼ Significantly higher or lower than total sample at 95% confidence

CONVERTING AWARENESS TO VISITATION

The funnel metric below illustrates the path to purchase in the sense that it explores someone’s awareness of the destination, the knowledge they have of what to do at the destination, how appealing they find the destination and how likely they are to visit in the future. 98% of New Zealand travellers have heard of the Coromandel. Going down the funnel, a new path to purchase measure is added each time. This means that the 24% at the bottom of the funnel represents the proportion of New Zealand travellers who have:

- Heard of the Coromandel, and
- Visited the Coromandel or have some ideas about what to do there, and
- Consider the Coromandel to be highly appealing, and
- Will probably / definitely visit the Coromandel in the next 12 months

The smaller numbers on the right hand side of the funnel represent the conversion between each of the stages.



A woman wearing a wide-brimmed hat and a light-colored top is seen from behind, walking across a suspension bridge. The background is a dense forest of tall, thin trees. The entire image is overlaid with a semi-transparent blue filter. On the left side, there is a large white circle containing the text 'AUSTRALIAN TRAVELLERS'.

**AUSTRALIAN
TRAVELLERS**

AUSTRALIAN TRAVELLERS

THE COROMANDEL UPDATE: YEAR ENDING JUNE 2022

The border closure during much of the reporting period has resulted in a relatively low sample size for the survey questions that relate to visitation.

Almost four out of five Australian travellers surveyed find the Coromandel appealing. This proportion is on par with the regional benchmark.

Australian travellers most commonly associate the Coromandel with nature/wildlife/eco-tourism and walking/hiking. Over half of Australian travellers surveyed agree that the Coromandel is 'a great place for a winter holiday' (54%), and 65% agree that the Coromandel is 'good for your soul'.

Net Promoter Score (NPS) is used to measure previous visitors' propensity to recommend the Coromandel as a travel destination. For the period of April - June 2022, the Coromandel's NPS amongst Australian travellers is +35, considerably above the regional benchmark of +21.

Almost one in five Australian travellers intending to travel to New Zealand in the next 12 months 'definitely will' visit the Coromandel. The Coromandel's future visitor profile skews towards the 20-49 years age bracket and family composition of children aged 5-14 years.

The most common barriers to visiting the Coromandel for Australian travellers are the lack of a specific reason to visit (26%), 'having been there before' (21%) and lack of knowledge of what the destination has to offer (21%).

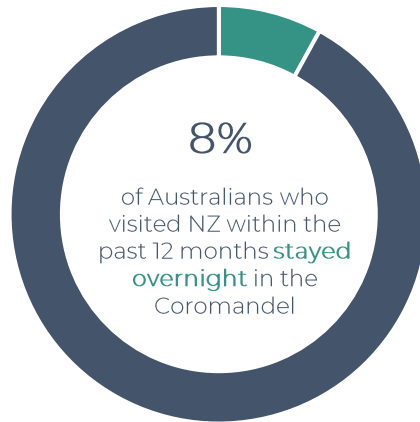
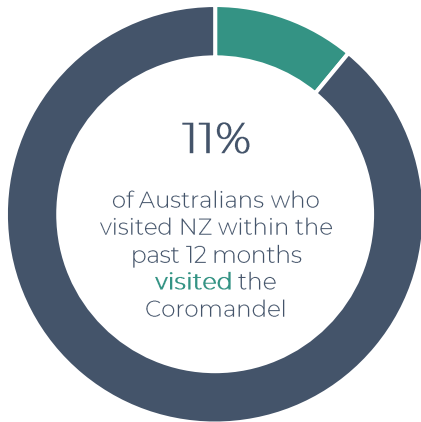


MARKET PENETRATION, FAMILIARITY & DESTINATION APPEAL



In the past 12 months, where (if anywhere) have you travelled? How familiar are you with the Coromandel as a destination to visit for a short break or holiday? How appealing is the Coromandel to you as a destination for a short break or holiday?

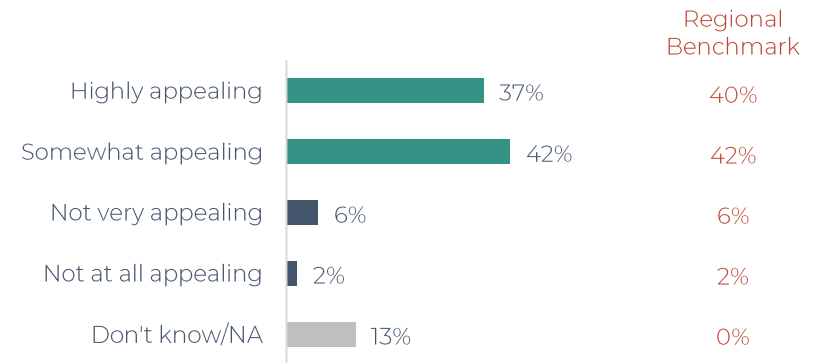
3% of Australians surveyed visited New Zealand in the past 12 months



Base: Travelled to NZ P12M (n=240)

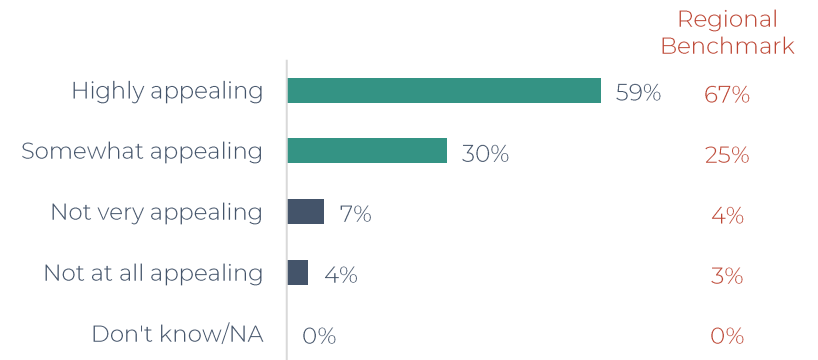
Familiarity		Regional Benchmark
I have visited the Coromandel	13%	21%
I have never visited, but do have some ideas about what you can do there	14%	18%
I have never visited, and don't know much about what you can do there	31%	32%
I have never heard of the Coromandel	42%	29%
Base: Total sample	n=3,712	

DESTINATION APPEAL (TOTAL SAMPLE)



Base: Heard of the Coromandel (n=2,142)

DESTINATION APPEAL (RECENT VISITORS)



Base: Visited the Coromandel P12M (n=27)

VISITOR PROFILE



	Total Sample	Visited the Coromandel (past 12 months)
Region of Residence		
Australian Capital Territory	2%	4%
New South Wales	32%	30%
Northern Territory	1%	0%
Queensland	20%	11%
South Australia	8%	7%
Tasmania	3%	4%
Victoria	24%	33%
Western Australia	10%	11%
Base:	n=3,712	n=27

	Total Sample	Visited the Coromandel (past 12 months)
Age		
18-19 years	4%	7%
20-29 years	16%	15%
30-39 years	18%	44% ▲
40-49 years	18%	19%
50-59 years	16%	7%
60-69 years	14%	4% ▼
70+ years	14%	4% ▼
Household Composition		
My husband, wife or partner	60%	63%
My mother and/or father	6%	11%
My children aged under 5	11%	15%
My children aged 5 to 14	21%	48% ▲
My children aged 15 or older	15%	11%
Other family/relatives	7%	11%
Other person(s)	4%	11%
None of the above – I live alone	16%	7%
Base:	n=3,712	n=27

ACTIVITIES / EXPERIENCES ASSOCIATED WITH THE COROMANDEL



Which, if any, of the following activities or experiences do you associate with the Coromandel?

Activities / Experiences	Module Sample
Nature, Wildlife & Eco-tourism	33%
Walking & Hiking	32%
Scenic Sight-Seeing	25%
Gardens, Parks & Reserves	24%
History & Heritage	24%
Family Activities	22%
Restaurants, Cafés & Bars	22%
Water-based Activities	20%
Māori/Pacific Culture	18%
Golf, Fishing & Hunting	17%
Shopping	16%
Wineries	14%
Cycling/Mountain Biking	13%
Spa & Wellness	13%
Volcanic & Geothermal	13%
Arts & Culture	11%
Adrenaline Activities	10%
Events, Concerts & Festivals	10%
Skiing/Snowboarding	9%
Casinos/Gambling	5%
Don't know/None of the above	24%
Base: Heard of the Coromandel	n=973

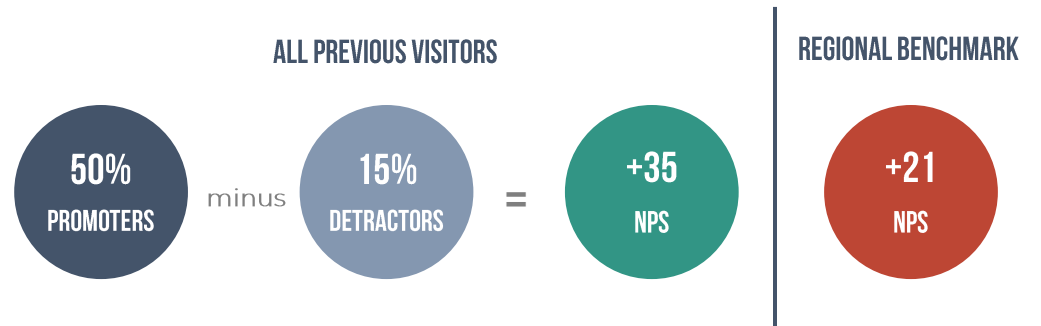
NET PROMOTER SCORE (NPS)



On a scale of 0 (not at all likely) to 10 (extremely likely), how likely are you to recommend the Waikato as a travel destination to a friend, family member, or colleague?

The Net Promoter Score (NPS) is an indicator used globally to measure customer engagement and advocacy, based on the likelihood of a customer to recommend your product or service. Any positive score means that you have more loyal advocates willing to recommend your product or service (promoters) than unhappy critics (detractors). A passive customer is satisfied, but unenthusiastic. A high score of +100 means that every customer is a promoter, while a low score of -100 means that every customer is a detractor.

		Visited the Coromandel previously
Promoters	10 (Extremely likely)	23%
	9	27%
Passive	8	20%
	7	14%
Detractors	6	8%
	5	3%
	4	0%
	3	0%
	2	1%
	1	0%
	0 (Not at all likely)	3%
Base*:		n=99



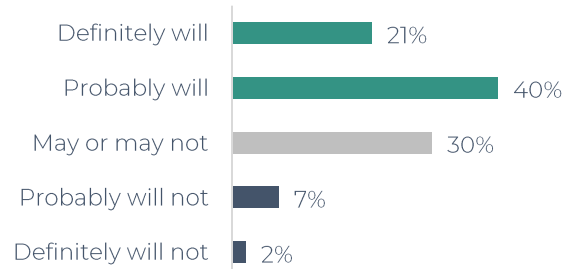
PROPENSITY TO VISIT THE COROMANDEL



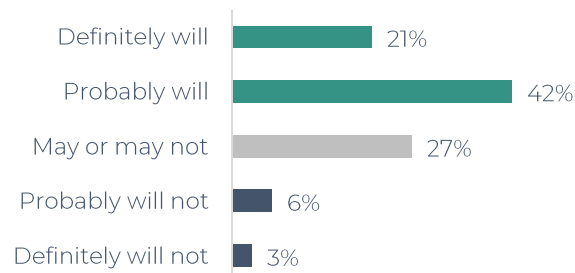
How likely are you to visit the Coromandel within the next 12 months? (for any reason / for leisure purposes)

36% of Australian travellers intend to travel to New Zealand in the next 12 months (i.e. definitely / probably will travel to NZ)

PROPENSITY TO VISIT THE COROMANDEL IN NEXT 12 MONTHS (ANY REASON)



PROPENSITY TO VISIT THE COROMANDEL IN NEXT 12 MONTHS (LEISURE)



Base: Intend to travel to NZ N12M, heard of the Coromandel (n=1,015)

AUSTRALIAN TRAVELLERS

FUTURE VISITOR PROFILE



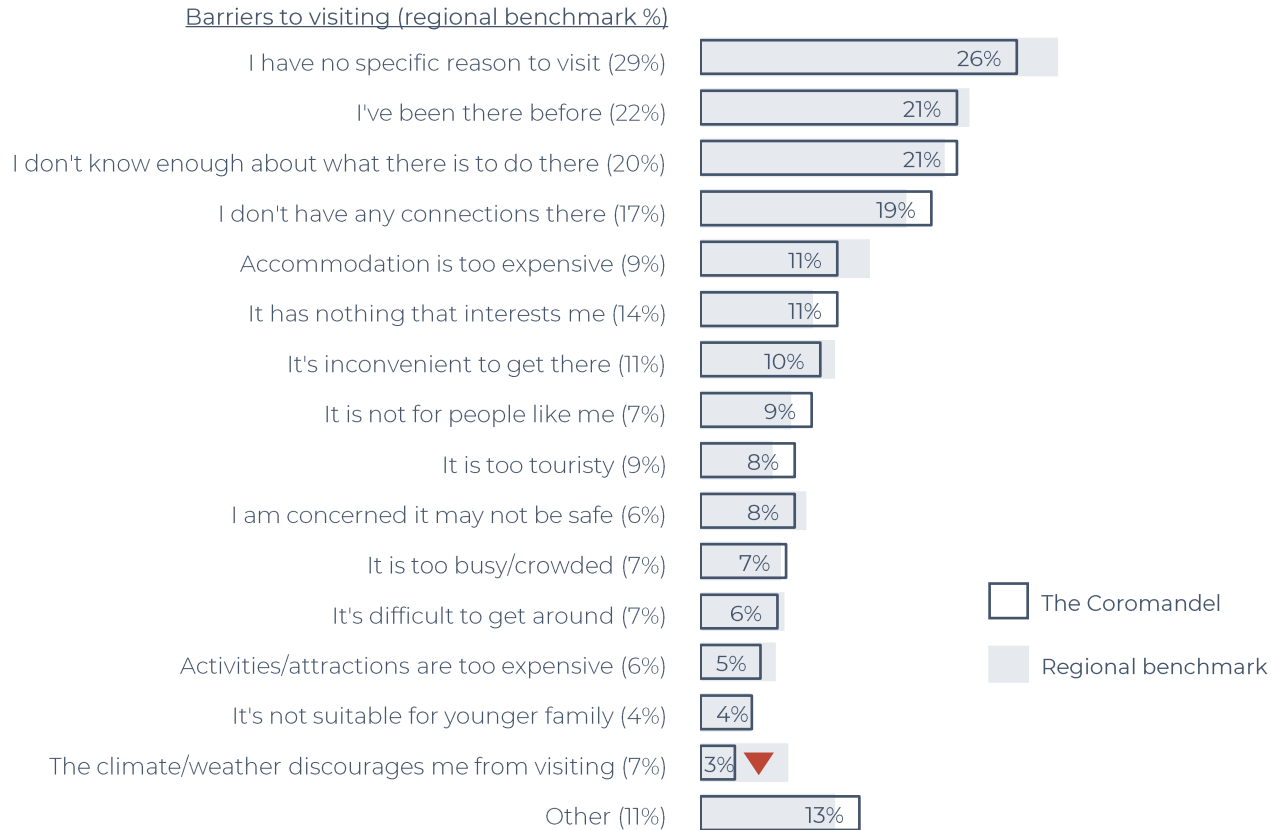
	Total Sample	'Definitely' will visit the Coromandel (next 12 months)
Region of Residence		
Australian Capital Territory	2%	2%
New South Wales	32%	35%
Northern Territory	1%	2%
Queensland	20%	16% ▼
South Australia	8%	4% ▼
Tasmania	3%	2%
Victoria	24%	27%
Western Australia	10%	12%
Base:	n=3,712	n=226

	Total Sample	'Definitely' will visit the Coromandel (next 12 months)
Age		
18-19 years	4%	2% ▼
20-29 years	16%	26% ▲
30-39 years	18%	31% ▲
40-49 years	18%	26% ▲
50-59 years	16%	9% ▼
60-69 years	14%	4% ▼
70+ years	14%	3% ▼
Household Composition		
My husband, wife or partner	60%	65%
My mother and/or father	6%	5%
My children aged under 5	11%	20% ▼
My children aged 5 to 14	21%	49% ▲
My children aged 15 or older	15%	15%
Other family/relatives	7%	4% ▼
Other person(s)	4%	3%
None of the above – I live alone	16%	5% ▼
Base:	n=3,712	n=226

BARRIERS TO VISITING THE COROMANDEL



You mentioned that you are unlikely to visit the Coromandel within the next 12 months. Why is that?



CONVERTING AWARENESS TO VISITATION

The funnel metric below illustrates the path to purchase in the sense that it explores someone’s awareness of the destination, the knowledge they have of what to do at the destination, how appealing they find the destination and how likely they are to visit in the future. 58% of Australian travellers have heard of the Coromandel. Going down the funnel, a new path to purchase measure is added each time. This means that the 7% at the bottom of the funnel represents the proportion of Australian travellers who have:

- Heard of the Coromandel, and
- Visited the Coromandel or have some ideas about what to do there, and
- Consider the Coromandel to be highly appealing, and
- Will probably / definitely visit the Coromandel in the next 12 months

The smaller numbers on the right hand side of the funnel represent the conversion between each of the stages.



